Grant Maker Pre-Award Core Series

Application Review, Workflow Configuration, Testing

AmpliFund

Grant Maker Pre-Award Core Series

AmpliFund

- **Training 1**: AmpliFund & Illinois System Integrations

- **Training 2**: Pre-Award - Master Data, Fund, Opportunity

- **Training 3**: Pre-Award - Application Configuration

- **Training 4**: Pre-Award - Scoring/Reviewer Field Set-up & Application Testing

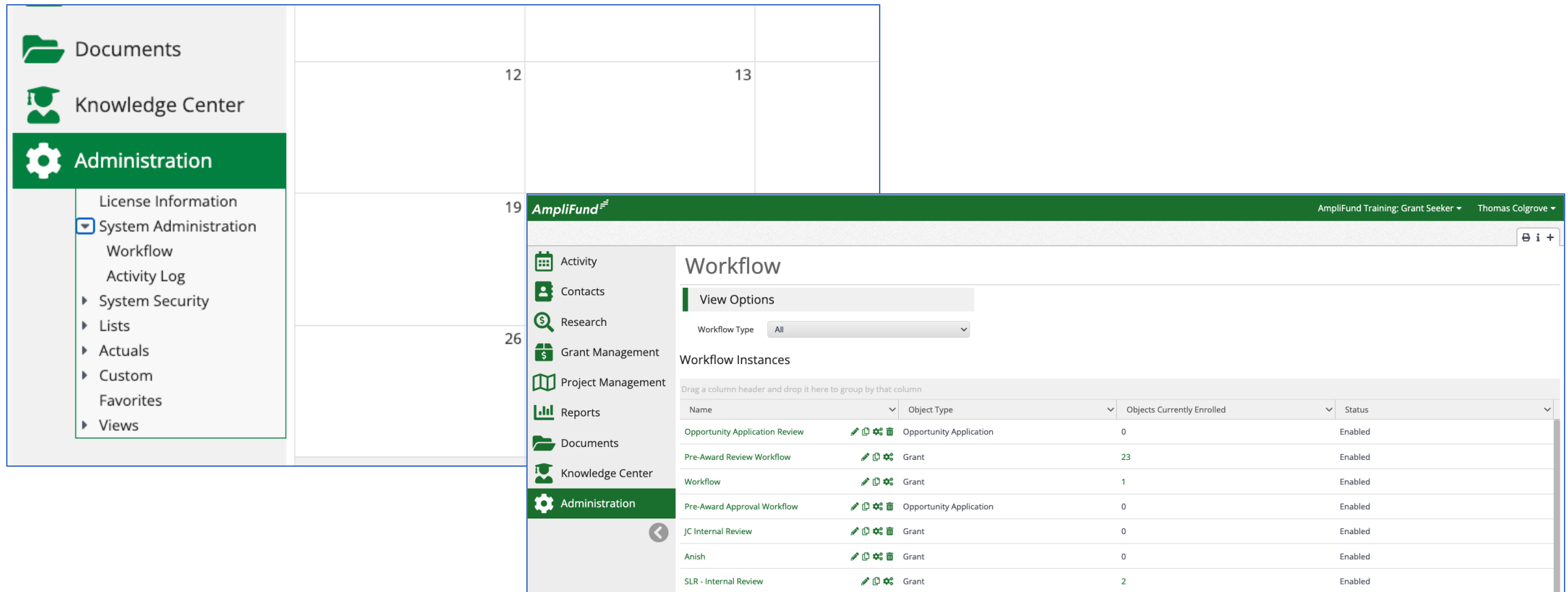- **Training 5**: Pre-Award - Application Review, Workflow Configuration, Testing

Agenda

- Configure Workflow
- Move Applications Through Workflow
- Score Applications
- In-Product Demo
- Next Steps
- Customer Support
- Question & Answer

AmpliFund

Application Workflow

Access Workflows

- Click on Administration > System Administration > Workflows.

Edit Workflows

- Click on the Workflow Name to access the Workflow details.
- Click on the pencil edit icon to edit the Workflow details.
- Click on the paper icon to copy the Workflow.
- Click on the gear icon to edit the Workflow Queue's and Action Items.
- Click on the trashcan icon to delete the Workflow.

Create Workflows

- Click on the + icon on the top right of the screen.

Workflow Details

- Select the Object Type.
  - Grant – Grants and Awards.
  - Opportunity – Applications.
- Enter the Name.
- Add a Description (Optional).

Workflow Details

Object Type*	Grant ⌄
Name*	ABC Org - Grant Application
Description	

Workflow Notifications

AmpliFund

- Select Action Alerts.
  - Yes or No.
- If Yes, select Days Since Last Action.
  - If a record is stalled for x days the users below will be notified.
- If Yes, select the Users to be Notified.
- Click Save on the bottom right of the screen.

Add Workflow Queues

- Click the + icon next to Add Workflow Queue.
  - Enter the Name.
  - Add a Description (Optional).
  - Select Users (Must click Add next to User field).
    - Any Users assigned at the Queue level have access to all Action Items within the Queue.
  - Click Save on the bottom right of the screen.

Opportunity Application Workflow Consideration

- Opportunity Application Workflow Queues have a Change Submission Status. The Status affects the Application. For example, when configuring the Award Applicant Queue an agency would set the Statas as Approved. In some instances, a Status Chage triggers an autogenerated system notification to the Applicant.
  - No Change
  - Not Applicable
  - Withdrawn
  - Reopened
  - Rejected
  - Approved
  - Submitted
  - Unsubmitted
  - Saved

New Queue

Workflow Queue Detail

Name*

Description

Change Submission Status

| Saved |
| Unsubmitted |
| Submitted |
| Approved |
| Rejected |
| Reopened |
| Withdrawn |
| Not Applicable |
| ✓ No Change |

User Permissions

User   Search for users...   Add

Current Users

Save   Cancel

View, Edit, Delete Workflow Queues

AmpliFund

- Click on the Workflow Queue to view the details.
- Click on the pencil edit icon to edit the details.
- Click on the trashcan icon to delete the Queue.

Add Workflow Action Items

- Click on the carrot dropdown to the left of Queue to see all Action Items within the Queue.

- Click on the + Icon next to the Queue
  - Enter the Name.
  - Add a Description (Optional).

Add Workflow Action Items

- Select the Action Type.
  - Select Destination Queue if Send to Queue Action Type
- Select Users (Must click Add next to User field).
  - Any Users assigned at the Action Item level only have access to that Action Item.
- Click Save on the bottom right of the screen.

Add Workflow Action Items

- Click on the carrot dropdown to the left of Queue to see all Action Items within the Queue.
- Click on the + Icon next to the Queue
  - Enter the Name.
  - Add a Description (Optional).

Workflow Action Types

AmpliFund

Opportunity Workflow

- Add Attachment
- Complete Task
- Send to Queue
- Remove from Workflow
- Award Applicant
- Create Related Item

Grant Workflow

- Add Attachment
- Complete Task
- Send to Queue
- Remove from Workflow

Workflow Action Details

Name*

Description

Action Type
✓ Add Attachment
Award Applicant
Complete Task
Create Related Item
Remove From Workflow
Send To Queue

User Permissions

User [🔍] Add

Workflow Action Details

Name*

Description

Action Type
✓ Add Attachment
Complete Task
Remove From Workflow
Send To Queue

User Permissions

User [Search for users... 🔍] Add

Edit Workflows

- Click on Administration > System Administration > Workflow.

- Click on the pencil edit icon to edit the Workflow Details.

- Click on the gear icon to edit the workflow Queues.
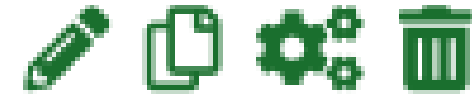
- Click on the trashcan icon to delete.

Edit Workflow Queues and Action Items

- Click on the pencil icon to edit.

- Click on the trashcan icon to delete.

- For Action Items only, click on the arrows to reorder.
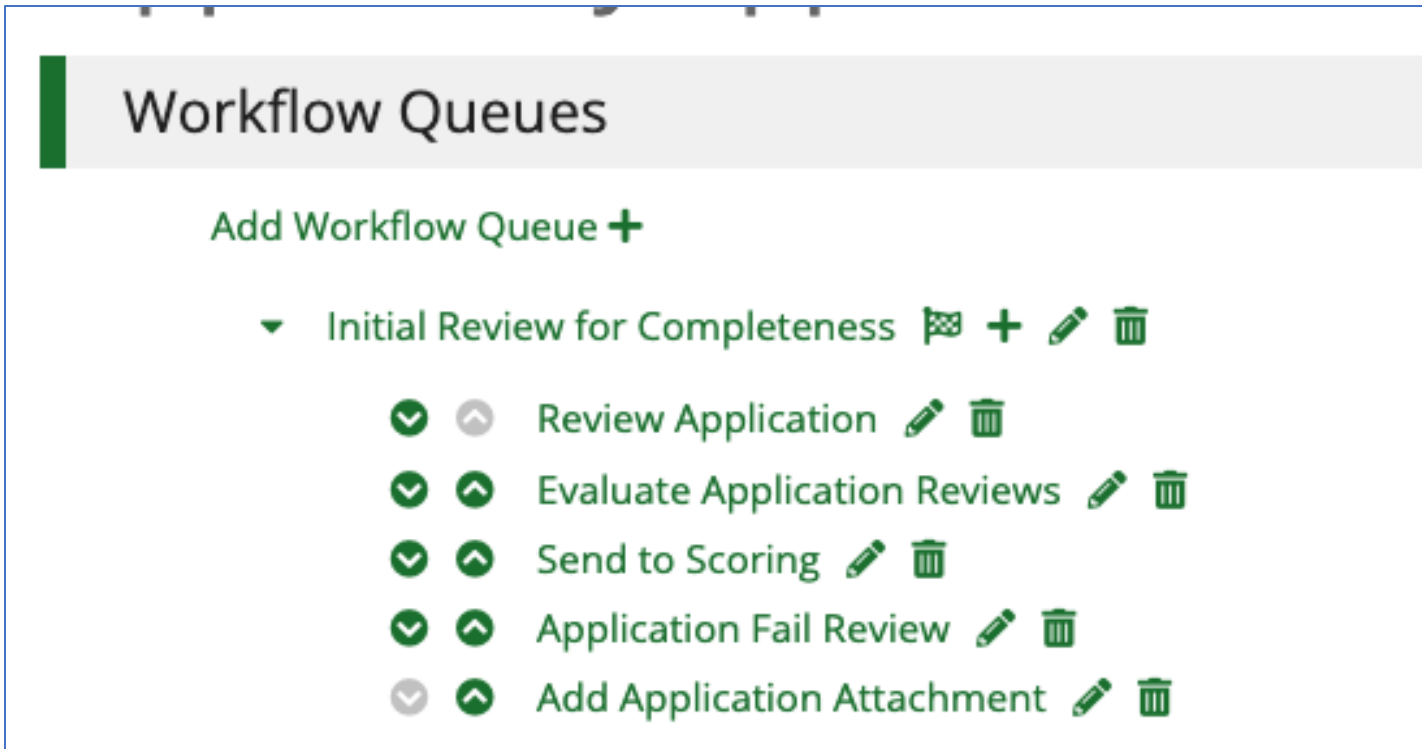
AmpliFund

Move Applications Through Workflow

Add Workflow to Opportunity

- Must have an Opportunity in AmpliFund.

- From the Opportunity Details page, click on Configuration > Workflow Settings.

- Coose the appropriate Opportunity Workflow.

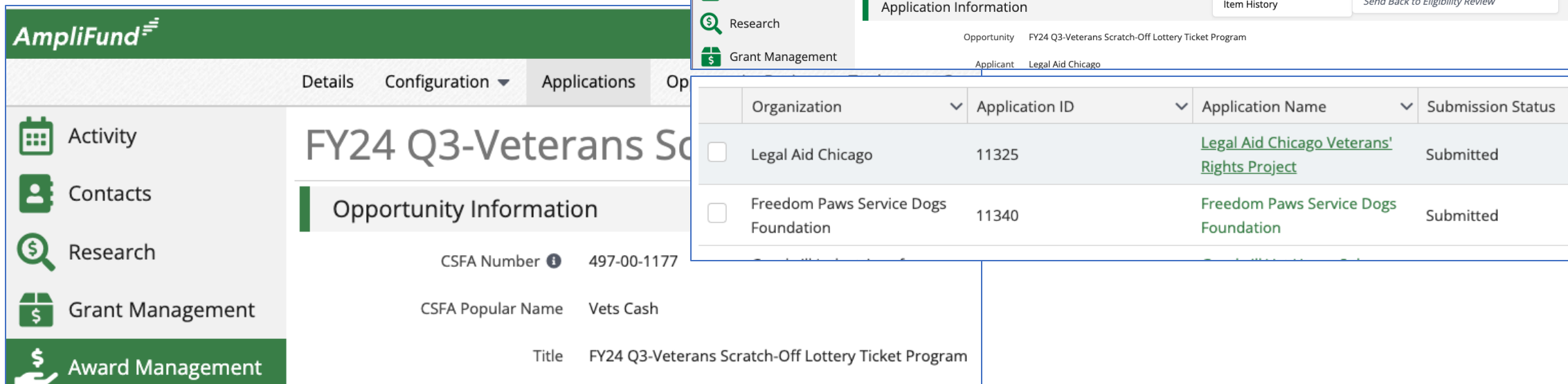- Click Add.

- Refer to slides 9 and 10 for editing Workflows.

Enroll Application into Workflow

- From the Opportunity Details page, click on Applications.

- Land on a list of all Application submitted.

- Select the appropriate Application.

- Click on Workflow

Enroll Grant into Workflow

- Access the appropriate Grant.

- Click on Grant Workflow.

- Add the Grant to the appropriate Workflow.

- Confirm.

Move Records Through Workflow

- From the Workflow tab click on the appropriate Action Item.

Task Completion

- Click on the Workflow or Grant Workflow > Workflow Task Completion to see all completed Task Action Types.

Item History

- Click on the Workflow or Grant Workflow > Item History to see all completed items.

Access Workflows

- Click on Administration > System Administration > Workflows.
- Click on the number in the Objects Currently Enrolled.

Access Workflow Actions from the Activity Center

- Click on Activity > Workflow Actions to see all objects enrolled in Workflow Queue's and Action Items you are responsible for.

AmpliFund

Score Applications

Score Applications – Workflow Action Item

- Select the Score Application Action Item via the Workflow tab on the Application.

- Must configure a Create Related Item – Application From Action Item Type in the Workflow.

Score Application Forms

- Score and add comments to each Application as needed.
- The Scored By You status should be Yes for each Application.

Review Budget

- Click the Comment tab next to the budget.
- Click on the Line Item for more details.
- Add comments.
- Click Submit Comments on the bottom right of the screen.

Total Proposed Budget by Category

Category	Grant Funded	Non-Grant Funded	Total Budgeted
Equipment	$100,000.00	$0.00	$100,000.00
Test Thomas	$0.00	$10,000.00	$10,000.00
Total Expense Budget Cost	**$100,000.00**	**$10,000.00**	**$110,000.00**

Comment

Proposed Budget

Expense Budget

Category	Grant Funded	Non-Grant Funded	Total Budgeted
Equipment	$100,000.00	$0.00	$100,000.00
Test	$100,000.00	$0.00	$100,000.00
Test Thomas	$0.00	$10,000.00	$10,000.00
Test Thomas	$0.00	$10,000.00	$10,000.00
Total Expense Budget Cost	**$100,000.00**	**$10,000.00**	**$110,000.00**

Revenue Budget

Grant Funding

Award Requested	$100,000.00		$100,000.00
Subtotal	**$100,000.00**		**$100,000.00**

Non-Grant Funding

Cash Match		$10,000.00	$10,000.00
Subtotal		**$10,000.00**	**$10,000.00**

Total Revenue Budget Cost	**($110,000.00)**
Total Overall Budget Cost	**$0.00**

Final Comments

Submit Comments   Cancel

Review Performance Plan

- Click the Comment tab next to the Performance Plan.
- Add comments.

Review Attachments

- Review and download Attachments as needed.

AmpliFund

In-Product Demo
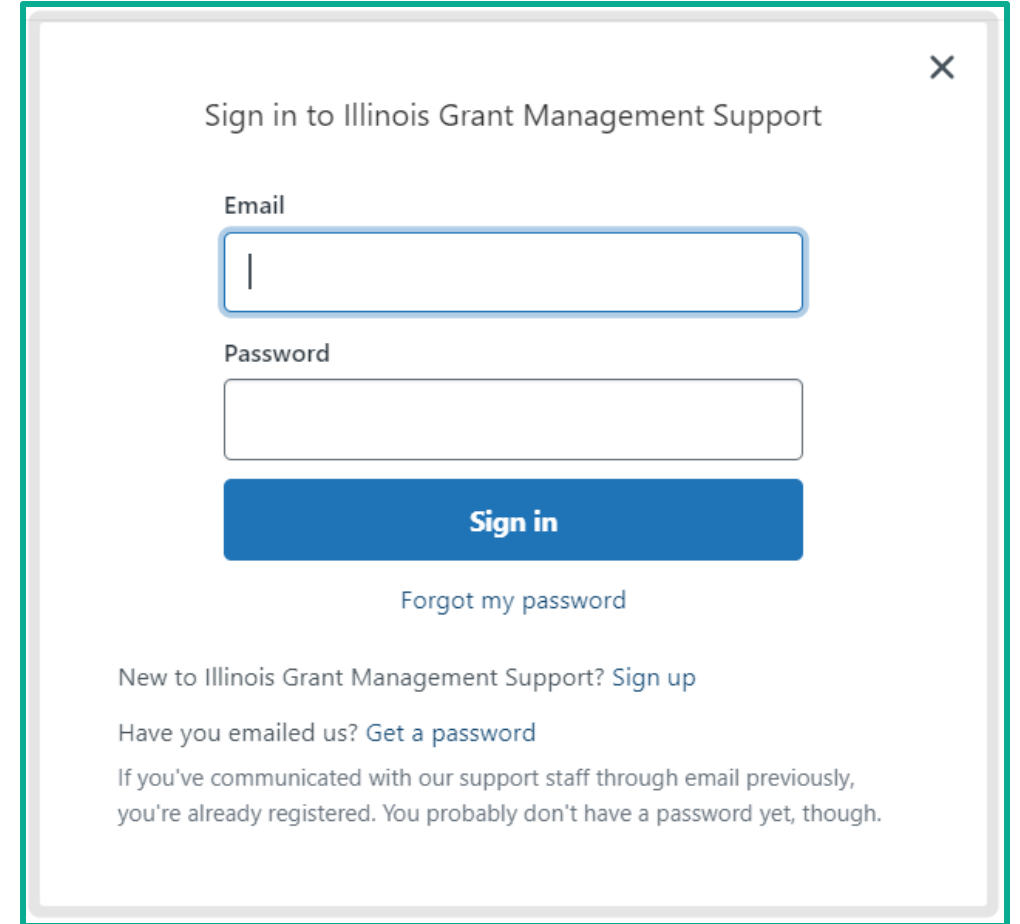
AmpliFund

Next Steps

Next Steps

- Submit a Test Application.

- Configure a basic Workflow.

- Move the Test Application through the Workflow.

AmpliFund

Customer Support

Create AmpliFund Support Account

AmpliFund

1. Access the appropriate support site.

2. Click the **Sign up** link.

3. Enter your **full name.**

4. Enter your **email address.**

5. Complete the **I'm not a robot** check.

6. Click the **Sign up** button.

7. An email from support@zendesk.com will be sent to you via email.

8. Click the link to set your password.

Sign in to Illinois Grant Management Support

Email

Password

Sign in

Forgot my password

New to Illinois Grant Management Support? Sign up

Have you emailed us? Get a password

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

AmpliFund Illinois Support Portal

Submit a support ticket:

Commercial – support@amplifund.zendesk.com.

Illinois – support@il-amplifund.zendesk.com.

Nebraska – support@ne-amplifund.zendesk.com.
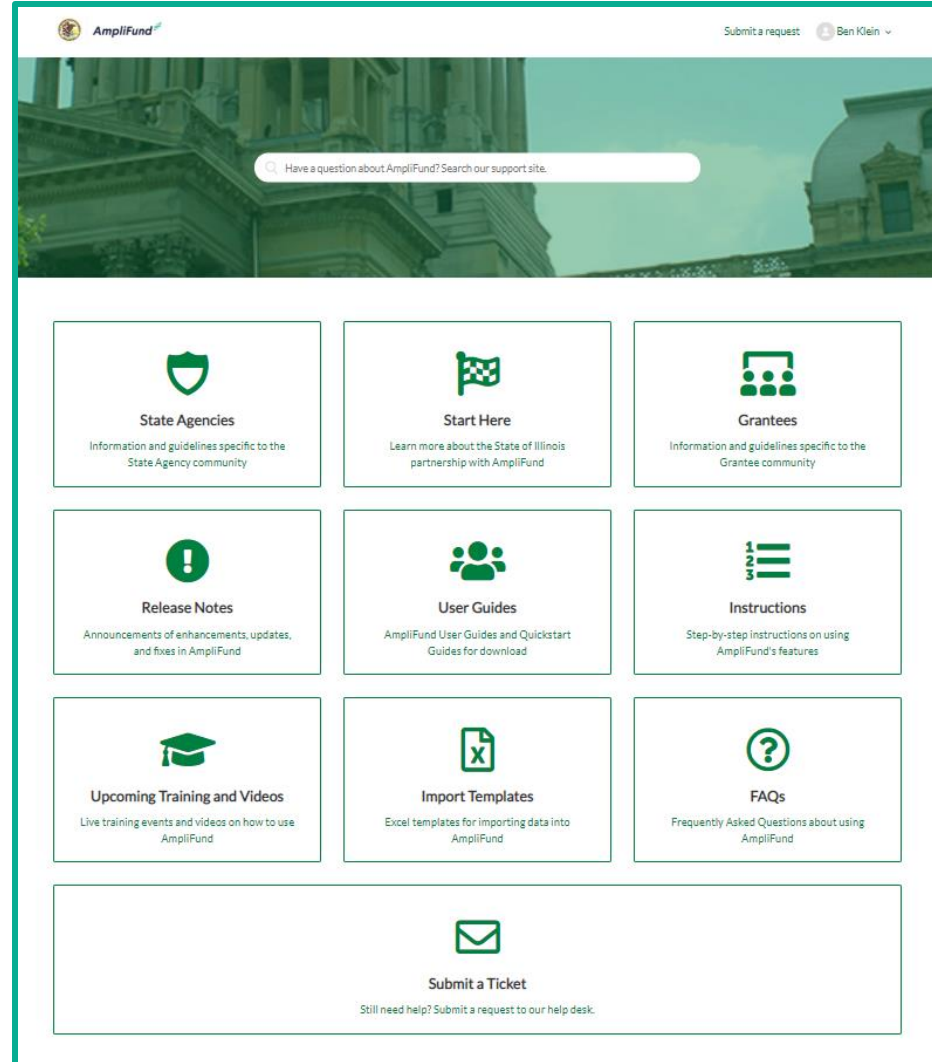
Visit Support Portal:

Commercial – https://amplifund.zendesk.com.

Illinois – https://il-amplifund.zendesk.com.

Nebraska – https://ne-amplifund.zendesk.com.

Production Site:

Commercial – https://www.gotomygrants.com.

Illinois – https://il.amplifund.com.

Nebraska – https://ne.amplifund.com.

AmpliFund

Question & Answer